

Summary

This sub-sector market research report analyzes the market for the equipment and services for the for industrial wastewater equipment and services industry. The report includes information on equipment and services to treat industrial wastewater generated by the manufacturing sector. The total market is expected to grow by approximately 6.4 percent from 2006 to 2007. This market has become more competitive, especially due to efforts made by companies from France, Great Britain, Japan, Canada and others.

The total market in 2005 for industrial wastewater equipment and services was USD 369.2 million. It is expected that the total market will increase to USD 392.9 million by the end of 2006. The large corporations represent 40 percent of the demand, and the medium, small, and micro enterprises represent 60 percent of the total market (including the in-bond maquiladora firms).

Market Demand

The National Water Commission (Comision Nacional del Agua-CNA) and the Attorney General for Environmental Protection (Procuraduria Federal de Proteccion al Ambiente-PROFEPA) have been working more closely during the last 10 years with Mexico's manufacturing sectors (chambers and associations) to encourage them to use available technologies to meet the industrial wastewater discharges standards (Normas Oficiales Mexicanas-NOMs) and to purchase technology to recycle wastewater to reduce the consumption of potable water in their manufacturing processes.

Mexico's manufacturing sector (including the maquiladora firms) consumes annually between 10 and 12 percent of the total available potable water (treated-surface water provided by the municipal water authorities and groundwater obtained by companies with authorization granted by the water authorities).

To ensure that the manufacturing sector is in compliance, authorities target this sector. PROFEPA indicated that of the 956 audits conducted in 2005, 75 percent were in the manufacturing sector to verify that the companies were meeting the two NOMs related to industrial wastewater discharges.

According to CNA, the most important water polluting industries that should be targeted by U.S. manufacturers of industrial wastewater equipment and services providers are: sugar, beverage and alcohol, petroleum, petrochemical, food processing, chemical, iron and steel, pulp and paper, mining and textiles.

Below in Table 1, it is shown that Mexico has over 400,000 manufacturing companies in the country in various industrial sectors that use surface water and groundwater for their manufacturing processes that are potential clients of equipment and services to reduce their industrial wastewater discharges. Over 97 percent of the total number is considered micro, small and mid-sized companies located in major cities such as Mexico City and its Metropolitan Area, Toluca, Guadalajara, Veracruz, Puebla, Queretaro, Celaya, Leon, Villahermosa, Cuernavaca, Tijuana, Reynosa, Ensenada, and Morelia. The other three percent are companies located in Mexico's major industrial cities (Monterrey, Guadalajara, Tijuana, Puebla, etc.)

Table 1

Manufacturing companies by sectors, 2005

Sector	Number of companies
Food, beverages and tobacco	110,810
Textiles, Dress and Leather	52,524
Wood and products including furniture	48,932
Paper, print and publishing	19,746
Chemicals, oils, coal, rubber and plastics	27,438
Non metallic mineral products	35,874
Basic metal industries	1,027
Metal products, machinery and equipment	78,981
Other manufacturing industries	25,695
Total	400,102*

*includes over 2,800 maquiladora firms located in the states of Baja California, Chihuahua, Sonora, etc.

Sources: National Institute of Statistics, Geography and Informatics (Instituto Nacional de Estadísticas, Geografía e Informática –INEGI) and the National Chamber of the Maquiladora Industry (Camara Nacional de la Industria de Maquiladora).

CNA estimates that by the end of 2005 only a total of 1,527 companies had installed industrial wastewater treatment plants and 1,448 were in operation. Table 2 includes the number of plants by state with their installed capacity in m3/s (cubic meters per second) and the rate of flow of wastewater that is treated.

It is estimated that Mexico's manufacturing sector in 2005 produced a flow of 171 m3/s of wastewater; of this flow, 15.3 percent (26.2 m3/s) was treated in industrial wastewater treatment plants (table 2), and approximately 17 percent of the organic charge generated by industries (measured in terms of Biochemical Oxygen Demand, or BOD) was removed.

Table 2

State	Total Number of plants	Plants in Operation	Installed Capacity (m3/s)	Rate of flow of wastewater treated (m3/s)
Aguascalientes	24	22	0.20	0.07
Baja California	181	155	1.00	0.91
Baja California Sur	10	9	0.19	0.19
Campeche	46	44	0.07	0.02
Coahuila	56	56	1.06	0.91
Colima	10	10	0.47	0.31
Chiapas	13	11	0.68	0.69
Chihuahua	22	21	0.66	0.28
Mexico City	3	3	0.03	0.03
Durango	18	18	0.45	0.27
Guanajuato	56	56	0.54	0.24
Guerrero	8	7	0.05	0.04
Hidalgo	47	47	1.66	1.02
Jalisco	54	54	0.38	0.38
State of Mexico	127	126	1.30	1.03
Michoacan	35	333	2.18	1.24

Morelos	67	56	0.85	0.75
Nayarit	4	4	0.16	0.16
Nuevo Leon	21	20	3.37	2.23
Oaxaca	13	13	0.87	0.75
Puebla	106	96	0.60	0.41
Queretaro	90	90	1.32	0.51
Quintana Roo	2	2	0.01	0.01
San Luis Potosi	58	57	0.52	0.37
Sinaloa	25	21	0.48	0.38
Sonora	19	17	0.30	0.08
Tabasco	66	66	0.43	0.38
Tamaulipas	38	38	1.14	1.04
Tlaxcala	70	70	0.22	0.28
Veracruz	158	156	12.81	11.10
Yucatan	72	62	0.14	0.10
Zacatecas	8	8	0.16	0.05
Total	1,527	1,448	34.30	26.23

Source: National Water Commission-CNA

Market Data

The industrial wastewater equipment and services market is expected to grow at an average of 6.4 percent during the next two years (Table 3), due to the collaboration among the CNA, PROFEPA, and the manufacturing sector (including the National Chamber of the Maquiladora Industry) that calls for the reduction of contaminants in industrial wastewater that goes into rivers, lakes, urban and municipal sewage systems.

The figures in Table 3 also show that the total market size for industrial wastewater treatment equipment and services will increase from USD 315.6 million in 2005 to USD 337.7 million by the end of 2006. According to CNA and PROFEPA officials, 40 percent of the industrial wastewater equipment and services will be in demand by the large corporations and 60 percent by the medium, small, and micro manufacturing firms located in the major industrial cities of the country.

Total imports of industrial wastewater equipment and services will grow at an average of 7 percent annually from 2005 to 2007. The growth is higher compared to 2004 to 2005, which was 6.5 percent average.

Table 3
Market Size for Industrial wastewater Equipment and Services
(USD Millions)

	2004	2005	2006 Estimate *	2006-2007 Growth rate
Import Market	295.0	315.6	337.7	7.0%
Local Production	112.0	115.4	118.9	3.0%
Exports	60.0	61.8	63.7	3.0%
Total Market**	347.0	369.2	392.9	6.4%
Imports from U.S.	177.0	189.4	209.4	10.5%

* The 2006 estimate is a projection of data available in December 2005.

** According to the Mexican Institute for Water Technology (Instituto Mexicano de Tecnologia del Agua-IMTA), the services part of the total market is around 12 percent.

Exchange Rates: 1 USD = 10.50

Inflation rate: 2005, 3.5; expected in 2006: 4.2

Sources: Statistics from the Mexican Import and Export Bank (Bancomext); Secretariat of Economy (Secretaria de Economia); Secretariat for the Environment and Natural Resources-SEMARNAT; National Water Commission-CNA ; Interviews with construction companies; contractors; end-users; and officials of the National Council of Environmental Executives-CONIECO, and the Mexican Institute for Water Technology-IMTA.

Best Prospects

The industrial wastewater treatment equipment and services market presents very good opportunities for U.S. suppliers. Companies should be aware that any technology above or equal to advanced primary treatment should comply with Mexican discharge standards. In the more sophisticated markets, such as export-oriented companies and multinationals, zero discharges technologies are well accepted

The wastewater processes and products most used by manufacturing firms in Mexico are extended aeration, activated sludge and trickling filters, instruments, appliances and machines, gears, ball bearings, water filters, centrifuges for filtering or purifying water, pumps, instruments and apparatus for measuring or checking pressure, flow meters, manometers, pipe, etc.

Key Suppliers

Local manufacturers are present in almost all equipment categories, as well as the distributors of industrial wastewater equipment. The below-mentioned companies are potential partners for U.S. firms and are some of the most important importers and distributors in the Mexican market:

Aqua Mex: Disenos Hidrologicos y Tecnologia Ambiental: Equipos para el Tratamiento de Agua; Quimica Ecotec; Tecnologia Ecologica Aplicada; Tecnologia en Sistemas Ambientales; Equipos y Suministros Industriales; Servicios de Ingenieria y Control Ambiental; Ingenieria y Sistemas de Agua; ECO Ingenieria; Proteccion Ambiental del Medio Ambiente; Grupo Constructor Tetra; Control Ambiental y Mantenimiento; Servicios y Abastecimeitnos Industriales; Servicios Ecologicos Especializados; Corporacion Hidro Industrial; and Tecnologia Industrial.

The main third country competitors are France, Great Britain, Japan, and Canada. The corresponding percentages are given in Table 4.

Table 4
Origin of Imports
Market Share (%)

Market share	2004	2005	2006 Estimate
US	60.0	61.0	62.0
France	11.0	10.0	10.0
Great Britain	10.0	9.0	9.0
Japan	5.0	6.0	9.0
Canada	5.0	6.0	7.0
Others	9.0	7.0	3.0

Third-country competitors

Third country firms usually have a representative in Mexico or have a strategic alliance with a local water resources equipment firm. Many have actively promoted their interests during the last five years by participating in trade shows and technical seminars in Mexico's leading cities. When shows and seminars are held in their countries, they may invite government officials and potential representatives to participate with all expenses paid. These visits include tours of the manufacturing plants, end-users, research institutions, which many times result in cooperation agreements, exchange of research information, and technical training programs. The below firms are some of the third country competitors.

Company	Country of Origin
Biwater	Great Britain
Degremont	France
Generale des Eaux	France
Lyonnaise des Eaux	France
John Meunier	Canada
Eco Equipment	Canada
Mitsubishi Corp.	Japan
Northwest Water	Great Britain

Prospective Buyers

Private Sector

The companies in the sub-sectors that will offer the greatest opportunities to the U.S. suppliers of equipment and services are:

Food, beverage and tobacco: The companies in this sub-sector will invest over USD 80 million during 2006 to 2007 in new equipment to meet the industrial wastewater discharge standards.

Textile, dress and leather: The companies in this sub-sector will invest over USD 70 million during 2006 to 2007 in new equipment to meet the industrial wastewater discharge standards.

Paper, print and publishing: The companies in this sub-sector will invest over USD 70 million during 2006 to 2007 in new equipment to meet the industrial wastewater discharge standards.

Chemical, oils, coal, rubber and plastics: The companies in this sub-sector will invest over USD 120 million during 2006 to 2007 in new equipment to meet the industrial wastewater discharge standards.

Government Sector

The government-owned petroleum company (Pemex), the Federal Electricity Commission (Comision Federal de Electricidad-CFE) and Mexico City's Light and Power Company (Compania de Luz y Fuerza del Centro-CLyF) are Mexico's government sector end-users of industrial wastewater equipment and services.

To participate in projects with the government sector end-users, companies are recommended to become familiar with the Pemex, CFE and CLyF programs and to find a local representative that monitors the domestic and international tenders that are governed by Mexico's Public Work laws and by the regulations of the World Bank and the Inter-American Development Bank (IDB).

Companies are recommended to review the list of tenders published on Tuesdays and Thursdays in the Mexican Official Gazette (Diario Oficial, <http://compranet.gob.mx>) and to follow the guidelines and requirements of the tenders for technical and economic proposals.

Types of Tenders

National Tenders

- a) are limited to purchases of between 11,500 pesos (approximately USD 10,256) to 175,000 pesos (approximately USD 153,846);
- b) are limited to participation by Mexican suppliers (U.S. firms with Mexican joint ventures or local representatives/ distributors are considered to be Mexican suppliers;
- c) must have at least fifty percent local content;
- d) must receive at least three national bid proposals (whether via invitation or public tender), or otherwise must be subject to international bid.

International Tenders

- a) required for purchases above USD 153,846; (under NAFTA, above USD 250,000);
- b) are required whenever Mexican suppliers cannot fill the requirements for a national tender;
- c) are subject to applicable Free Trade Agreement (FTA). (Mexico has signed FTA's with the United States and Canada, Bolivia, Costa Rica, Colombia, Venezuela, Chile, and with the European Community);
- d) are subject to conditions imposed by international financial institutions when the contracts include credits granted by them (World Bank, Inter-American Development Bank and EximBank); and,
- e) are without any requirement for local content.

Invitational tenders

Pemex, CFE, and CLyF are allowed to establish their own parameters on special projects and emergencies such as hurricanes, earthquakes, etc. These awards are used for small purchases, and are very much a sole-source procedure. The threshold for invitational tenders for small purchases is defined annually, typically ranging between 8,000.00 pesos (approximately USD 833.33) to 176,900 pesos (approximately USD 17,692.00), for machinery and equipment respectively.

Market Entry

Often, the decision to select an industrial wastewater equipment depends on the demonstrated commitment to service the client after the sale has been made. This has been the most effective tool that third country manufacturers have used to penetrate the market. They offer to have their maintenance personnel at the clients' facilities in no more than 48 hours after a service call is made. The availability of required spare parts is the natural complement to the presence of their technicians.

Customers in the industrial wastewater industry are demanding uniform quality control, compliance with international standards, productivity, lower production costs, just-in-time deliveries and above all, reliable local service and maintenance programs. This last factor has become, in many instances, even more important than pricing or financing in the industrial wastewater equipment purchasing decision. U.S. firms should bear in mind, however, that Mexican firms are extremely price sensitive.

U.S. firms wishing to promote their products and/or services to Mexican representatives and/or buyers can do so by participating in the trade exhibitions program of Commercial Service Mexico, held annually in Mexico through privately held exhibitions and/or seminars. The U.S. Commercial Service in Mexico City can also help U.S. firms identify potential partners-clients.

Advertisements in specialized magazines are very effective, especially in publications distributed to members of associations or distributed to large industrial wastewater equipment distributors and contractors firms.

Market Issues and Obstacles

According to the 1998 modifications in the Mexican customs law, the participation of a customs broker is not obligatory for imports if all legal and technical requirements are met. In the same change, in order to import some goods, it is now required that the importer be registered as such with the Secretariat of Treasury and Public Credit (Secretaria de Hacienda y Credito Publico-SHCP). The participation of a customs broker is suggested when the exporter is not familiar with the Mexican standards and customs processing procedures.

Almost all industrial wastewater equipment from NAFTA countries are exempt from any import duties. Duty for non-NAFTA countries range from 3 to 15 percent for the same products. For specific tariff information on non-NAFTA rates contact the Commercial Service in Mexico City.

A 15 percent Value Added Tax (IVA) is assessed on the cumulative value, consisting of the U.S. plant value (invoice) of the product, plus the inland U.S. freight charges, any other costs listed separately on the invoice such as export packing plus the duty. The importer will pay other IVA fees for such services as the inland Mexico freight and warehousing. The IVA tax is only 10 percent for border area destinations. The IVA is recovered at the point of sale.

The following example shows the difference in import costs for a NAFTA firm versus a non-NAFTA firm. The example also shows the effect of the 15 percent VAT on the final import price versus a non-NAFTA manufacturer's price.

Direct Import Cost Template

	US Firm	Non-NAFTA Firm
Base Price	\$100.00	\$100.00
Freight (estimated 8.0%)	8.00	8.00
Insurance (1.5% of C&F)	1.62	1.62
Dutiable base =CIF	109.62	109.62
Ad Valorem Duty (3.0%)	0	3.29
Value Added Tax (15.0%)	16.44	16.94
Total	\$126.06	\$129.85
Port Costs (Unloading, storage, Est 6.0% CIF)	7.56	7.79
Freight forwarder fee (Est. 1.5% CIF)	1.64	1.64
Bank charges (2.0% of FOB price)	2.00	2.00
GRAND TOTAL	\$137.26	\$141.28

Note:

As of July 1, 1999 NAFTA originating goods are no longer subject to the 0.8% customs processing fee. A NAFTA certificate of origin is needed to take advantage of this exemption.

Temporary import permits are issued by the Mexican Economy Secretary (Secretaria de Economia) to Mexican importers to carry out projects with the Federal and state water resources agencies or private sector clients. Permits can be issued for a maximum period of six months. Industrial wastewater equipment imported under a temporary import permit does not pay the value added tax.

CERTIFICATE OF ORIGIN: A certificate of origin is required from all foreign suppliers or exporters. If the product qualifies as North American in content, the exporter must use the NAFTA Certificate of Origin in order to benefit from preferential treatment under NAFTA. This is the responsibility of the exporter and

the forms are available from the U.S. Customs Service, freight forwarders, or local U.S. Chambers of Commerce. The certificate should contain at least the following:

- Name of Exporter
- Name of Producer
- Tariff Classification of Product
- Description of Goods (similar to invoice)
- Number of the Official Invoice

FREE SALE CERTIFICATE: This certificate is required for all products entering Mexico. This certificate proves that the imported goods are also sold in the country of origin. A letter from the local Chamber of Commerce is sufficient proof and the importer would present it at the time of importation.

NOM CERTIFICATION: (Normas Oficiales Mexicanas - Mexican Official Standards). There are two NOMs applicable for the industrial wastewater equipment to be met when the equipment is installed for the discharge of the wastewater. NOM-001-SEMARNAT-1996 (sets the limits of industrial wastewater discharges into rivers, lakes, ocean); and NOM-002-SEMARNAT-1996 (sets the limits for the industrial wastewater discharges into the urban and municipal sewage system). Information on the above noms is available at: www.cna.gob.mx

LABELING REQUIREMENTS: According to Mexico's Federal Law on Metrology and Standardization, industrial wastewater equipment sold in Mexico is exempted from having a label in Spanish affixed to each product. Listing the required information in Spanish on the shipping container will satisfy the labeling requirement. The Spanish information on the box must contain, at a minimum, the following information:

- Name and address of the importer
- Importer's Ministry of Finance Taxation Number (RFC number and/or their Industry Association registration number)
- Exporter's name and address
- Trademark or commercial brand name of the product
- Product description whenever the product is packed in such a form that it is not visible
- Use, handling, and care instructions for the product, as required
- Country of origin
- Warnings or precautions on hazardous products
- Size, if applicable, Mexico's Federal Law on Metrology and Standardization stipulates that all weights and measures must be in the metric system.

There are no barriers for importing industrial wastewater equipment. However, the Mexican import law is very strict on the required documentation. While it is not required, it may be advantageous when selling equipment to use a reputable customs broker to properly prepare the paperwork needed. The basic documents required to import industrial wastewater equipment into Mexico include:

- 1) Import petition.
- 2) NAFTA Certificate of origin.
- 3) Commercial bill.
- 4) Insurance and freight bills.

The products qualifying as North American must use the NAFTA Certificate of Origin in order to receive preferential treatment. The exporter or broker may issue such a certificate. It does not have to be validated or formalized. Other entities that may issue a Certificate of Origin include government agencies, producers, exporters, industrial and commercial chambers of commerce, and associations that are legally authorized in the United States. Like the U.S., Mexico uses the Harmonized Tariff System

(H.S.). However, Mexico uses only eight digits while the U.S. uses up to ten digits. The first six digits used under the HS system are identical for all countries, the rest may vary.

Table 5 shows the import duties assessed on some industrial wastewater treatment equipment.

Table 5
Import Duties for selected Industrial wastewater Equipment

Harmonized System Number	Product	NAFTA Tariff Reduction Schedule	Current Import Duties N/O*
90272001	Analyzers	A	0/2
84813004	Automatic check valves	C	0/15
84821099	Ball bearings	C	0/10
84137005	Centrifugal pumps	C	0/15
84818011	Control valves	B	0/12
84212102	Chemical water purifiers based on chlorine	B	0/12
39269016	Filter membranes of plastics	A	0/15
90261003	Flowmeters	B	0/15
84136003	Gear Pumps	B	0/15
84132001	Hand Pumps	B	0/15
84818013	Hydrants for sprinklers	A	0/15
902610990	Instruments and apparatus for measuring or checking the flow level of liquids	B	0/30

*In the 4th column it shows import duties for products from NAFTA (N) and non-NAFTA countries (O). Example 0/2, column shows import duties for products imported from NAFTA countries (0) and with which Mexico has no free trade agreement (2).

Category A: Duties on U.S. products were fully eliminated on January 1, 1994.

Category B: Duties on U.S. products were fully eliminated on January 1, 1998.

Category C: Duties on U.S. products were fully eliminated on January 1, 2003.

The Commercial Service of the U.S. Embassy in Mexico City has an officer who follows developments in the standards area:

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Financing

Financing is very important to marketing in Mexico, particularly in the industrial wastewater industry

Mexico's 10 commercial banks offer a full spectrum of services within one institution. These services range from offering deposit accounts, consumer and commercial lending, corporate finance, and the operation of trust and mutual funds, to foreign exchange and money market trading. Mexico's commercial banking sector has been opened to foreign competition. The North American Free Trade Agreement (NAFTA) permits U.S. and Canadian banks or any other foreign bank with a subsidiary in the U.S. or Canada to establish wholly owned subsidiaries in Mexico.

It is not a requirement for U.S. suppliers of industrial wastewater equipment to bring the financing to sell their equipment. It is a general practice for Mexican companies that purchase industrial wastewater equipment to use commercial bank financing to pay for the technology. An irrevocable letter of credit is commonly used when dealing with foreign suppliers. The major Mexican commercial banks besides having correspondent banks in the United States provide typical bank services, such as transfer of funds, letters of credit, and money orders.

High value sales usually are made through letters of credit. Small value sales are either made with cash or with a 50 percent advance payment when the order is placed and 50 percent on delivery.

Development Banks in Mexico such as NAFIN (others are BANCOMEXT, BANOBRAS, FIANCIERA RURAL, etc.) have become primarily second-tier banks that reaches priority sectors such as the industrial wastewater resources industry by lending through commercial banks and factoring companies for private companies to purchase industrial wastewater equipment.

Additionally, U.S. government agencies, such as the U.S. Trade and Development Agency (USTDA), the U.S. Export Import Bank (Exim), the Overseas Private Investment Corporation (OPIC) have programs in this sector. USTDA finances feasibility studies and other forms of technical assistance. Exim can guarantee up to 85 percent of the U.S. content and OPIC can provide insurance if 25% of the project investment is from the United States.

Trade Events

4TH World Water Summit. The event is bi-annual and it is rotated by country. The 2006 summit will have over 200 exhibitors and conferences from various countries. The U.S. will be participating with over 30 companies exhibiting at the show. Participants will be offered the Gold Key Service and receive valuable market research information at a breakfast briefing to be held at the U.S. Trade Center.

Name of Event:	World Water Forum
Date of Event:	March 16-21, 2006
Location:	Mexico City, Mexico
Venue:	BANAMEX Exhibition Facility
Frequency of Event:	Bi-annual

ENVIRO-PRO is a Certified Trade Show and it is the leading event in Mexico related to the environmental industry. For the fourth year in a row the U.S. Commercial Service Mexico will be participating with a centrally-located USA Pavilion to offer U.S. companies the opportunity to exhibit their products and services. In addition to having booth space in the Pavilion, participants will be offered the Gold Key Service (separate fee), enjoy access to private meeting space, receive valuable market research at no cost and a breakfast briefing.

Name of Event:	ENVIRO-PRO 2006
Date of Event:	September 20-22, 2006
Location:	Mexico City, Mexico
Venue:	World Trade Center
Frequency of Event:	Annual

Resources and Key contacts

Secretariat for the Environment and Natural Resources: <http://www.semarnat.gob.mx>

National Water Commission: <http://www.cna.gob.mx>

National Institute of Ecology: <http://www.ine.gob.mx>

Attorney General for Environmental Protection: <http://www.profepa.gob.mx>

Mexican Institute for Water Technology: <http://www.imta.mx>

National Council of Environmental Executives: <http://www.conieco.org>

For More information

The Commercial Service in Mexico City/Mexico can be contacted via e-mail at: Francisco Ceron, Senior Trade Specialist, e-mail: Francisco.ceron@mail.doc.gov; Phone 011(52-55) 5140-2640; Fax 011 (52-55) 5566-1111 or visit our website: www.buyusa.gov/

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